

Workforce Administration Solution (Admin)

By

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Project Abstract

Workforce Administration Solution is a software application or platform designed to streamline and automate various aspects of employee's working on projects and Asset Assignment processes within an organization. It serves as a centralized system for managing employee data, number of projects an employee is working on, tracking employee performance, and keeping record for the assets which they are assigned to.

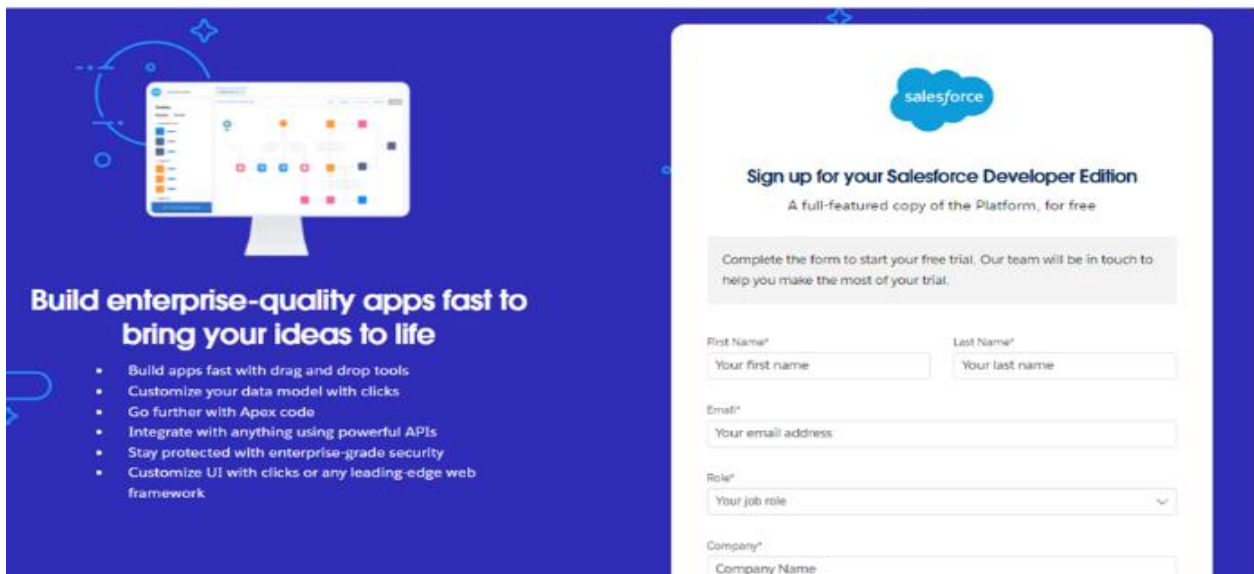
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INTRODUCTION

Workforce Administration Solution is a software application or platform designed to streamline and automate various aspects of employee's working on projects and Asset Assignment processes within an organization. It serves as a centralized system for managing employee data, number of projects an employee is working on, tracking employee performance, and keeping record for the assets which they are assigned to. In an effort to enhance data security and performance while simplifying system administration, Workforce Administration Solution is transitioning to Salesforce, a new cloud technology. By leveraging this advanced platform, the company can ensure the safe storage of sensitive data through robust encryption and proactive backup mechanisms. The cloud's automated data replication capabilities provide added protection and efficient disaster recovery solutions. With access to scalable resources, Workforce Administration Solution can optimize performance, ensuring fast and reliable access to data. This shift to the new cloud technology streamlines administrative tasks, reducing complexity and allowing system administrators to focus on higher-value activities, ultimately increasing productivity and enhancing overall operational efficiency.

Task 1: Salesforce



The image shows a promotional banner for Salesforce Developer Edition on the left and a sign-up form on the right. The banner features a computer monitor displaying a Salesforce interface and a list of benefits. The sign-up form includes the Salesforce logo, a title, a subtitle, a description, and several input fields for user information.

Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

Sign up for your Salesforce Developer Edition
A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name*
Your first name

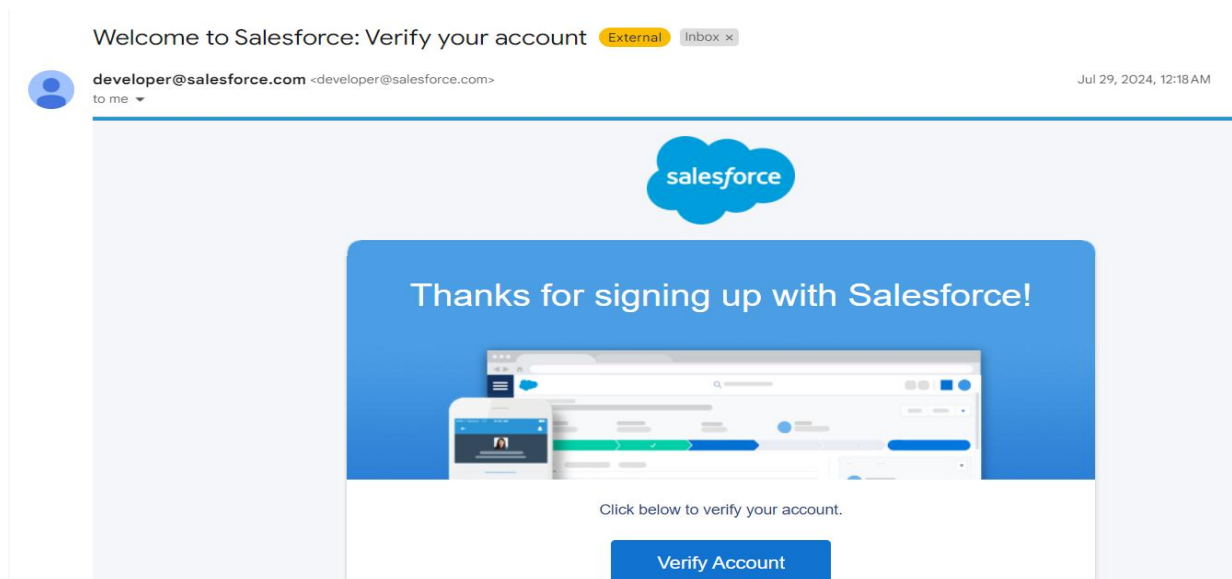
Last Name*
Your last name

Email*
Your email address

Role*
Your job role

Company*
Company Name

Activity 1: Creating Developer Account



The image shows an email interface with a header bar containing the text 'Welcome to Salesforce: Verify your account' and buttons for 'External' and 'Inbox x'. Below the header is a blue banner with the Salesforce logo and the text 'Thanks for signing up with Salesforce!'. Underneath the banner is a graphic of a smartphone and a laptop displaying the Salesforce interface. Below the graphic is a button labeled 'Verify Account'.

Welcome to Salesforce: Verify your account External Inbox x

developer@salesforce.com <developer@salesforce.com> Jul 29, 2024, 12:18 AM
to me

Thanks for signing up with Salesforce!

Click below to verify your account.

Verify Account

Activity 2: Account Activation

Task 2: Object

The screenshot displays the Workforce Admin interface. The top navigation bar contains the following items: **Employees**, **Projects**, **ProjectTasks**, **Assets**, **Asset Services**, **Reports**, and **Dashboards**. The **Employees** menu item is highlighted with a red box. Below the navigation bar, the **Employees** section is active, showing a list of 5 items. The list includes the following data:

	<input type="checkbox"/> Employee ID	
1	<input type="checkbox"/> EMS-0008	<input type="button" value="v"/>
2	<input type="checkbox"/> EMS-0004	<input type="button" value="v"/>
3	<input type="checkbox"/> EMS-0010	<input type="button" value="v"/>
4	<input type="checkbox"/> EMS-0015	<input type="button" value="v"/>
5	<input type="checkbox"/> EMS-0002	<input type="button" value="v"/>






Activity : Create 5 Object with label name as Employee, Projects, Project Tasks, Assets, Asset Services

Task 3: Tabs



Custom Object Tabs

New What Is This?

Action	Label	Tab Style	Description
Edit Del	Assets	 Building	
Edit Del	Asset Services	 Can	
Edit Del	Employees	 Airplane	
Edit Del	Projects	 Bank	
Edit Del	ProjectTasks	 Books	


Activity : Creating 5 Custom Tabs - Employees, Projects, Project Task, Assets, Asset Services

Task 4: The Lightning App

SETUP Lightning Experience App Manager								New Lightning App New Connected App	
23 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type								⚙️	
	App Name ↑	Developer Name	Description	Last Modified Date	App T...	Visi...			
10	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	28/07/2024, 11:06 pm	Lightning	✓	⌵		
11	Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	28/07/2024, 11:06 pm	Classic	✓	⌵		
12	Platform	Platform	The fundamental Lightning Platform	28/07/2024, 11:06 pm	Classic		⌵		
13	Queue Management	QueueManagement	Create and manage queues for your business.	28/07/2024, 11:06 pm	Lightning	✓	⌵		
14	Sales	Sales	The world's most popular sales force automation (SFA) solution	28/07/2024, 11:06 pm	Classic		⌵		
15	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	28/07/2024, 11:06 pm	Lightning	✓	⌵		
16	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	28/07/2024, 11:06 pm	Lightning	✓	⌵		
17	Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	28/07/2024, 11:06 pm	Classic	✓	⌵		
18	Salesforce Scheduler Se...	LightningScheduler	Set up personalized appointment scheduling.	28/07/2024, 11:08 pm	Lightning	✓	⌵		
19	Service	Service	Manage customer service with accounts, contacts, cases, and more	28/07/2024, 11:06 pm	Classic	✓	⌵		
20	Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across cu...	28/07/2024, 11:06 pm	Lightning	✓	⌵		
21	Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com applic...	28/07/2024, 11:06 pm	Classic		⌵		
22	Subscription Managem...	RevenueCloudConsole	Get started automating your revenue processes	28/07/2024, 11:06 pm	Lightning	✓	⌵		
23	Workforce Administrato...	Workforce_Administrator_...		29/07/2024, 12:57 am	Lightning	✓	⌵		








Activity : Create A Lightning App - Workforce Administration Solution

Task 5: Fields & Relationships



SetupHomeObject Manager

Search Setup



SETUP > OBJECT MANAGER
Employee

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Fields & Relationships

26 Items, Sorted by Field Label

Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Address	Address__c	Text Area(255)			
Age	Age__c	Formula (Number)			
Cab Allowance	Cab_Allowance__c	Checkbox			
Cab Allowance Amount	Cab_Allowance_Amount__c	Currency(18, 0)			
Created By	CreatedById	Lookup(User)			
Date of Birth	Date_of_Birth__c	Date			
Email	Email__c	Email			
Employee ID	Name	Auto Number		✓	
Employee Name	Employee_Name__c	Text(18)			
Joining date	Joining_date__c	Date			
Last Modified By	LastModifiedById	Lookup(User)			
LinkedIn Profile	LinkedIn_Profile__c	URL(255)			
Logout Time	Logout_Time__c	Time			
Mode of Work	Mode_of_Work__c	Picklist			
Owner	OwnerId	Lookup(User,Group)		✓	
Phone no	Phone_no__c	Phone			
Qualification	Qualification__c	Text(18)			
Owner	OwnerId	Lookup(User,Group)		✓	
Phone no	Phone_no__c	Phone			
Qualification	Qualification__c	Text(18)			
Record Type	RecordTypeId	Record Type		✓	
Reports to	Employee__c	Lookup(Employee)		✓	
Wifi Allowance Amount	Wifi_Allowance_Amount__c	Currency(18, 0)			
Wifi Allowances	Wifi_Allowances__c	Checkbox			
Food Allowances	Food_Allowances__c	Checkbox			
Login Time	Login_Time__c	Time			

Activity : Creating Fields In Employee Object

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Fields & Relationships

9 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
End Date	End_Date__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Project ID	Name	Auto Number		✓
Project Lead	Project_Lead__c	Text(18)		
Project Name	Project_Name__c	Text(18)		
Project Status	Project_Status__c	Picklist		
Start Date	Start_Date__c	Date		

Activity : Creating Fields In Project Object

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Fields & Relationships

7 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Employee Name	Employee_Name__c	Master-Detail(Employee)		✓
Finishes in	Finishes_in__c	Formula (Number)		
Last Modified By	LastModifiedById	Lookup(User)		
Project Task	Project_Task__c	Master-Detail(Project)		✓
ProjectTask Name	Name	Text(80)		✓
Working Hours	Working_Hours__c	Number(18, 0)		

Activity : Creating Fields In ProjectTask Object

SETUP > OBJECT MANAGER

Asset

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Fields & Relationships

8 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Asset Name	Name	Text(80)		✓	▼
Asset Type	Asset_Type__c	Picklist			▼
Created By	CreatedById	Lookup(User)			
Date Of Issue	Date_Of_Issue__c	Formula (Date)			▼
Employee Name	Employee_Name__c	Lookup(Employee)		✓	▼
Last Modified By	LastModifiedById	Lookup(User)			
Model Name	Model_Name__c	Text(18)			▼
Owner	OwnerId	Lookup(User,Group)		✓	

Activity : Creating Fields In Asset Object

SETUP > OBJECT MANAGER

Asset Service

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Fields & Relationships

9 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Asset Id	Asset_Id__c	Lookup(Asset)		✓	▼
Asset Service Name	Name	Text(80)		✓	▼
Created By	CreatedById	Lookup(User)			
Description	Description__c	Long Text Area(32768)			▼
Last Modified By	LastModifiedById	Lookup(User)			
Owner	OwnerId	Lookup(User,Group)		✓	
Subject	Subject__c	Text Area(255)			▼
Technician	Technician__c	Text(18)			▼
Type	Type__c	Picklist			▼

Activity : Creating Fields In Asset Services Object

Task 6: Setting OWD

Setup

Home

Object Manager

Q sharing

Security

Guest User

Sharing Rule Access Report

Sharing Settings

idn't find what you're looking for?
y using Global Search.


SETUP

Sharing Settings

Waitlist	Private	Private	✓
Web Cart Document	Private	Private	✓
Work Order	Private	Private	✓
Work Plan	Private	Private	✓
Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Asset	Public Read/Write	Private	✓
Asset Service	Private	Private	✓
Employee	Private	Private	✓
Project	Private	Private	✓
ProjectTask	Controlled by Parent	Controlled by Parent	

Activity : Create OWD Setting

Task 7: User Adoption



Workforce Administ...

★


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⚙️

12



Employees

Projects

ProjectTasks

Assets

Asset Services

Reports

Dashboards

Employee

EMS-0008

New Contact

Edit

New Opportunity

Related

Details

Employee ID

EMS-0008

Owner

 Aditya Sharma

Employee Name

Emma

Date of Birth

29/11/1998

Age

26.00

Gender

Female

Reports to

Qualification

B.Tech

Address

Experience

3

Phone no

7995434756

Email

emma@abc.com

Joining date

13/11/2020

Mode of Work

Remote

Cab Allowance

☐

Food Allowances

☐

Wifi Allowances

☒

Cab Allowance Amount

Food Allowance Amount

Wifi Allowance Amount

₹500

Login Time

Logout Time

LinkedIn Profile

<https://www.linkedin.com/in/emma>

Created By

 Aditya Sharma · 30/07/2024, 8:25 pm

Last Modified By

 Aditya Sharma · 30/07/2024, 8:25 pm

Activity : Create and View A Record (Employee)

Task 8: Import Data

data import

Integrations

Data Import Wizard

Didn't find what you're looking for?
Try using Global Search.

Setup

Home

Object Manager

Search Setup

12

SETUP

Bulk Data Load Jobs

Bulk Data Load Job

750NS0000012Ref

Help for this Page

View the details of a bulk data load job.

Back to List: Bulk Data Load Jobs

Bulk Data Load Job Detail

Reload

Job ID	750NS0000012Ref	Job Type	Bulk V1	Status	Closed
Submitted By	Aditya Sharma	Operation	Insert	Total Processing Time (ms)	100
Start Time	18/08/2024, 2:43 am IST	Queued Batches	0	API Active Processing Time (ms)	57
End Time	18/08/2024, 2:43 am IST	In Progress Batches	0	Apex Processing Time (ms)	0
Time to Complete ([hh:mm:ss])	00:05	Completed Batches	1		
Object	Employee	Failed Batches	0		
External ID Field		Progress	100%		
Content Type	CSV	Records Processed	14		
Concurrency Mode	Parallel	Records Failed	0		
API Version	61.0	Retries	0		

Reload

Batches

View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	751NS000000P1P7	18/08/2024, 2:43 am	18/08/2024, 2:43 am	100	57	0	14	0	0		Completed

Activity: Importing Data Using Data Wizard

Task 9: Profiles

Setup

Home

Object Manager

profiles

Users

Profiles

Didn't find what you're looking for?
Try using Global Search.

SETUP

Profiles

Profiles

All Profiles

Edit | Delete | Create New View

New Profile

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Profile Name	User License +	Custom
<input type="checkbox"/> Edit Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Work.com Only User	Work.com Only	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	On Site Employee	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Manager	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Remote Employee	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Minimum Access - API Only Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Salesforce API Only System Integrations	Salesforce Integration	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	HR	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Marketing User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom: Support Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom: Marketing Profile	Salesforce	<input checked="" type="checkbox"/>

Activity : Creating HR, Manager, Employee(Remote and Onsite) Profile

Task 11: Users



All Users

Help for this Page

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users [Edit](#) | [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

<input type="checkbox"/>	Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Edit	Chatter Expert	Chatter	chatty.00dns000000bwlt2am.vrocnmabodw7@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/>	Edit	Mikaelson, Kol	kmika	21052472123@kiit.ac.in	Manager	✓	Manager
<input type="checkbox"/>	Edit	Mikaelson, Niklaus	nmika	210524729090@kiit.ac.in	HR	✓	HR
<input type="checkbox"/>	Edit	Patnaik, Parthiv	ppatin	210524722121@kiit.ac.in	On Site Employee	✓	On Site Employee
<input type="checkbox"/>	Edit	Purohit, Mayank	mpuro	2105247212222@kiit.ac.in	Remote Employee	✓	Remote Employee
<input type="checkbox"/>	Edit	Sharma, Aditya	AShar	aditya1234560903@salesforce.com		✓	System Administrator
<input type="checkbox"/>	Edit	User Integration	integ	integration@00dns000000bwlt2am.com		✓	Analytics Cloud Integration User
<input type="checkbox"/>	Edit	User Security	sec	insightssecurity@00dns000000bwlt2am.com		✓	Analytics Cloud Security User

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

Activity : Create Users

Task 12: Page Layouts

The screenshot shows the Salesforce Setup interface for configuring the 'Employee' object layout. The left sidebar lists navigation options: Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules.

The main content area displays the 'Employee' object layout configuration. At the top, there are tabs for 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. Below these is a 'Quick Find' search bar and a table of fields. The 'Fields' table has columns: Section, Field Name, Email, Food Allowance Am..., Last Modified By, Mode of Work, and Record Type. The fields listed are: Cab Allowance, Cab Allowance Amount, Employee ID, Food Allowances, LinkedIn Profile, Owner, Reports to, Address, Created By, Employee Name, Gender, Login Time, Phone no, Wifi Allowance Am..., Age, Date of Birth, Experience, Joining date, Logout Time, Qualification, and Wifi Allowances.

The layout configuration shows the following sections:

- Personal Information:** Date of Birth (18/08/2024), Address (Sample Text), Age (791.38).
- Allowances:** Cab Allowance (checked), Cab Allowance Amount (₹123.45), Food Allowances (checked), Food Allowance Amount (₹123.45).
- System Information:** Created By (Sample Text), Last Modified By (Sample Text).
- Custom Links:** (Header visible on edit only).
- Mobile Cards:** (Salesforce mobile only).

Activity : Creating A Page Layout For On-site Employee

The screenshot shows the Salesforce Setup interface for configuring the 'Employee' object layout. The left sidebar lists navigation options: Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules.

The main content area displays the 'Employee' object layout configuration. At the top, there are tabs for 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. Below these is a 'Quick Find' search bar and a table of fields. The 'Fields' table has columns: Section, Field Name, Email, Food Allowance Am..., Last Modified By, Mode of Work, and Record Type. The fields listed are: Cab Allowance, Cab Allowance Amount, Employee ID, Food Allowances, LinkedIn Profile, Owner, Reports to, Address, Created By, Employee Name, Gender, Login Time, Phone no, Wifi Allowance Am..., Age, Date of Birth, Experience, Joining date, Logout Time, Qualification, and Wifi Allowances.

The layout configuration shows the following sections:

- Personal Information:** Date of Birth (18/08/2024), Address (Sample Text), Age (759.74).
- Allowances:** Wifi Allowances (checked), Wifi Allowance Amount (₹123.45).
- System Information:** Created By (Sample Text), Last Modified By (Sample Text).
- Custom Links:** (Header visible on edit only).
- Mobile Cards:** (Salesforce mobile only).

Activity : Creating A Page Layout For Remote Employee

Task 13: Chatter Group

The screenshot displays the Salesforce Chatter interface for a group named "Internal Discussion". The top navigation bar includes a search bar and various utility icons. Below the navigation bar, the group header shows the group name, privacy settings (Private with Customers), and buttons for "New Contact", "New Opportunity", and "New Case". The main content area is divided into two sections: "Chatter" and "Engagement". The "Chatter" section features a post creation area with tabs for "Post", "Poll", and "Question", a text input field, and a "Share" button. Below this is a "Sort by" dropdown set to "Most Recent Activity" and a "Search this feed..." input. A post by Aditya Sharma, dated 31 July 2024 at 7:17 pm, is visible with a welcome message. The "Engagement" section includes a "Write a comment..." input. The right sidebar contains "Group Details" (Description, Show More Information, Group Email, Owner), "Manage Members" (Search People...), "Membership Requests (0)", "Members (3)" (listing Aditya Sharma, Niklaus Mikaelson, and Mayank Purohit), "Files (0)" (Upload Files button), and "Records (0)".

Activity : Creating A Chatter Group For Your Organization.

Task 14: Record Types

SETUP > OBJECT MANAGER

Employee

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Record Type

On Site Employee

Help for this Page

« Back to Custom Object: Employee

Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available for records with this record type.

Edit

Record Type Label

On Site Employee

Active

✓

Record Type Name

On_Site_Employee

Namespace Prefix

Description

Created By

Aditya Sharma

31/07/2024, 7:46 pm

Modified By

Aditya Sharma

31/07/2024, 7:46 pm

Picklists Available for Editing

Help

Action

Field

Modified Date

Edit

Gender

31/07/2024, 7:46 pm

Edit

Mode of Work

31/07/2024, 7:46 pm

Activity: Creating On Site Employee Record Type

SETUP > OBJECT MANAGER

Employee

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Record Type

Remote Employee

Help for this Page

« Back to Custom Object: Employee

Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available for records with this record type.

Edit

Record Type Label

Remote Employee

Active

✓

Record Type Name

Remote_Employee

Namespace Prefix

Description

Created By

Aditya Sharma

31/07/2024, 7:48 pm

Modified By

Aditya Sharma

31/07/2024, 7:48 pm

Picklists Available for Editing

Help

Action

Field

Modified Date

Edit

Gender

31/07/2024, 7:48 pm


Edit

Mode of Work

31/07/2024, 7:48 pm

Activity: Creating Remote Employee Record Type

Task 15: Permission Sets



SetupHomeObject Manager

Search Setup

Star icon, Plus icon, Refresh icon, Help icon, Settings icon, 12 notifications, User profile icon

permission sets

Users

Permission Sets

Didn't find what you're looking for? Try using Global Search.

SETUP

Permission Sets

Permission Set Overview

Object Settings

Employees

Edit

Find Settings...

Clone

Edit Properties

Manage Assignments

View Summary

Video Tutorial | Help for this Page

Permission Set: Per to Emp

Tab Settings

Available	Visible
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Employee: Record Type Assignments

Record Types	Assigned Record Types
On Site Employee	<input checked="" type="checkbox"/>
Remote Employee	<input type="checkbox"/>

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

Field Permissions

Field Name	Field API Name	Read Access	Edit Access
Address	Address__c	<input type="checkbox"/>	<input type="checkbox"/>
Age	Age__c	<input type="checkbox"/>	<input type="checkbox"/>
Cab Allowance	Cab_Allowance__c	<input type="checkbox"/>	<input type="checkbox"/>
Cab Allowance Amount	Cab_Allowance_Amount__c	<input type="checkbox"/>	<input type="checkbox"/>
Created By	CreatedById	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Date of Birth	Date_of_Birth__c	<input type="checkbox"/>	<input type="checkbox"/>
Email	Email__c	<input type="checkbox"/>	<input type="checkbox"/>
Employee ID	Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Employee Name	Employee_Name__c	<input type="checkbox"/>	<input type="checkbox"/>
Experience	Experience__c	<input type="checkbox"/>	<input type="checkbox"/>
Food Allowance Amount	Food_Allowance_Amount__c	<input type="checkbox"/>	<input type="checkbox"/>
Food Allowances	Food_Allowances__c	<input type="checkbox"/>	<input type="checkbox"/>
Gender	Gender__c	<input type="checkbox"/>	<input type="checkbox"/>
Joining date	Joining_date__c	<input type="checkbox"/>	<input type="checkbox"/>
Last Modified By	LastModifiedById	<input checked="" type="checkbox"/>	<input type="checkbox"/>
LinkedIn Profile	LinkedIn_Profile__c	<input type="checkbox"/>	<input type="checkbox"/>
Login Time	Login_Time__c	<input type="checkbox"/>	<input type="checkbox"/>
Logout Time	Logout_Time__c	<input type="checkbox"/>	<input type="checkbox"/>
Mode of Work	Mode_of_Work__c	<input type="checkbox"/>	<input type="checkbox"/>
Owner	OwnerId	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Phone no	Phone_no__c	<input type="checkbox"/>	<input type="checkbox"/>
Qualification	Qualification__c	<input type="checkbox"/>	<input type="checkbox"/>
Record Type	RecordTypeId	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Reports to	Employee__c	<input type="checkbox"/>	<input type="checkbox"/>
Wifi Allowance Amount	Wifi_Allowance_Amount__c	<input type="checkbox"/>	<input type="checkbox"/>
Wifi Allowances	Wifi_Allowances__c	<input type="checkbox"/>	<input type="checkbox"/>

Activity : Creating A Permission Set

Task 16: Reports

Workforce Administ...

Search...

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12

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Employees

Projects

ProjectTasks

Assets

Asset Services

Reports

Dashboards

Recently Viewed | Groups

Report: Employees

New Employees Report

Enable Field Editing

🔍

Add Chart

📄

🔄

Edit

⌵

Total Records

28

	Employee: Employee ID	Employee Name	Reports to	Login Time	Logout Time	Mode of Work	LinkedIn Profile
1	EMS-0029	Chloe	-	-	5:00 pm	On Site	https://www.linkedin.com/in/chole
2	EMS-0028	Scarlett	-	-	-	Remote	https://www.linkedin.com/in/scarlett
3	EMS-0027	Elizabeth	-	-	-	Remote	https://www.linkedin.com/in/elizabeth
4	EMS-0026	Amelia	-	-	5:00 pm	On Site	https://www.linkedin.com/in/amelia
5	EMS-0025	Isabella	-	-	5:00 pm	On Site	https://www.linkedin.com/in/isabella
6	EMS-0024	Sophia	-	-	-	Remote	https://www.linkedin.com/in/sophia
7	EMS-0023	Olivia	-	-	-	Remote	https://www.linkedin.com/in/olivia
8	EMS-0022	Emma	-	-	-	Remote	https://www.linkedin.com/in/emma
9	EMS-0021	Ethan	-	-	5:00 pm	On Site	https://www.linkedin.com/in/ethan
10	EMS-0020	William	-	-	5:00 pm	On Site	https://www.linkedin.com/in/william
11	EMS-0019	Alexander	-	-	5:00 pm	On Site	https://www.linkedin.com/in/alex
12	EMS-0018	Benjamin	-	-	-	Remote	https://www.linkedin.com/in/benjamin
13	EMS-0017	James	-	-	-	Remote	https://www.linkedin.com/in/james
14	EMS-0016	Jackie Chan	-	-	5:00 pm	On Site	https://www.linkedin.com/in/jackie
15	EMS-0015	Chloe	-	-	5:00 pm	On Site	https://www.linkedin.com/in/chole
16	EMS-0014	Scarlett	-	-	-	Remote	https://www.linkedin.com/in/scarlett
17	EMS-0013	Elizabeth	-	-	-	Remote	https://www.linkedin.com/in/elizabeth
18	EMS-0012	Amelia	-	-	5:00 pm	On Site	https://www.linkedin.com/in/amelia
19	EMS-0011	Isabella	-	-	5:00 pm	On Site	https://www.linkedin.com/in/isabella
20	EMS-0010	Sophia	-	-	-	Remote	https://www.linkedin.com/in/sophia
21	EMS-0009	Olivia	-	-	-	Remote	https://www.linkedin.com/in/olivia
22	EMS-0008	Emma	-	-	-	Remote	https://www.linkedin.com/in/emma
23	EMS-0007	Ethan	-	-	5:00 pm	On Site	https://www.linkedin.com/in/ethan
24	EMS-0006	William	-	-	5:00 pm	On Site	https://www.linkedin.com/in/william
25	EMS-0005	Alexander	-	-	5:00 pm	On Site	https://www.linkedin.com/in/alex
26	EMS-0004	Benjamin	-	-	-	Remote	https://www.linkedin.com/in/benjamin
27	EMS-0003	James	-	-	-	Remote	https://www.linkedin.com/in/james
28	EMS-0002	Jackie Chan	-	-	5:00 pm	On Site	https://www.linkedin.com/in/jackie

Activity : New Employees Report

Activity : Employees with ProjectTasks and Projects Report

Activity : New Assets with Employee Name Report

Employees

Report: Assets with Employee Name

New Assets with Employee Name Report

Enable Field Editing

🔍

Add Chart

📄

🔄


Edit

⌵

Total Records

0

Task 17: Dashboards

 Dashboard

Dashboard 1

Last refreshed 18 days ago. Refresh this dashboard to see the latest data.

As of 31-Jul-2024, 8:09 pm Viewing as Aditya Sharma

Refresh

Edit

Subscribe


▼

Employees with ProjectTasks and Projects

To view this table, refresh the dashboard.

View Report

Activity : Create Dashboard Employees with ProjectTask and Projects(Dashboard 1)



Workforce Administr...

Employees

Projects

ProjectTasks

Assets

Asset Services

Reports

Dashboards

* Recently Viewed | Groups

Search...

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12

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 Dashboard

Dashboard 2

As of 18-Aug-2024, 1:12 am Viewing as Aditya Sharma

Refresh

Edit

Subscribe

▼

New Employees Report

Employee: Employee ID...	Employee Na...	Reports...	Login Ti...	Logout Ti...
EMS-0006	William	-	-	5:00 pm
EMS-0007	Ethan	-	-	5:00 pm
EMS-0008	Emma	-	-	-
EMS-0009	Olivia	-	-	-
EMS-0010	Sophia	-	-	-
EMS-0011	Isabella	-	-	5:00 pm
EMS-0012	Amelia	-	-	5:00 pm
EMS-0009	Olivia	-	-	-
EMS-0010	Sophia	-	-	-
EMS-0011	Isabella	-	-	5:00 pm
EMS-0012	Amelia	-	-	5:00 pm
EMS-0013	Elizabeth	-	-	-
EMS-0014	Scarlett	-	-	-
EMS-0015	Chloe	-	-	5:00 pm

View Report (New Employees Report)

Activity : Create Dashboard New Employees Report(Dashboard 2)

Thank you